Provider Web Tools
Provider Admin

User Guide

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1. Introduction

1.1 What is a Provider Representative

In an ongoing effort to make completion and submission easier and more accurate, budgets and claims for reimbursement of State line item supports are now submitted to the Bureau of Developmental Disabilities (BDDS) via a secure website at http://www.ddrsprovider.fssa.in.gov. Any provider staff person who creates and submits budgets and/or claims for individuals funded by BDDS State Line funding must have a username and password for the Online Budget tool.

To facilitate the creation and maintenance of usernames and passwords, each provider agency that is approved to provide State Line supports must have a Provider Representative on file with the BDDS. The Provider Representative will act as the administrator of that agency's access to the BDDS' online Budget tool, and must create and maintain all of the data entry level usernames and passwords for staff within their agency who create and submit budgets or claims.

The Provider Representative is given a username and password that allows them access only to the administration portion of the online budget tool. If a Provider Representative will also be creating and submitting budgets or claims, the Provider Representative must have a second and different data entry username and password.

BDDS will only maintain the usernames and passwords of the Provider Representatives. It will be up to the Provider Representatives to maintain the usernames and passwords of their fellow employees, and to ensure that only appropriate personnel are given access to the system. BDDS can only assign or change the username or password of the Provider Representative.

As Provider Representative you are responsible for creating and managing all the budget tool accounts for persons within your company who data enter State Line Item budgets or claims. To create and manage these accounts, you must go to the Budget tool website and enter your Provider Representative username and password.

1.2 Provider Admin Passwords

Passwords must be six (6) characters in length and are case-sensitive. This means that the password must be spelled exactly the same way every time. If the password is **TrueLove2006**, then the **T** and the **L** must both be capitalized or the password will not work. If you fail to correctly type your password six (6) times in a row, your account will become locked and must be unlocked by the DDRS Data Management Office (DDMO). You can send an email to the DDMO at ddrsdata@fssa.in.gov to have the Provider Representative account unlocked. The DDMO can only unlock the Provider Representative account.

1.3 Changing the Provider Representative

To assign a different person to be the Provider Representative, send the following information to the BDDS Central Office on agency letterhead:

1) A statement that the Provider Representative needs to be changed
2) The name and email address of the exiting Representative
3) The name, email address, and phone number of the new Provider Representative

This information must be postal mailed to:

<div align="center">

State Line Budgets and Billing
FSSA/DDRS/BDDS
402 W. Washington Street, Room W453
PO Box 7083 / MS#18
Indianapolis, IN 46207-7083

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2. Step by Step Manual for Provider Representatives

The website for Provider Representatives is the same as the site used by the Data Entry person: [https://ddrsprovider.fssa.in.gov/BDDS].

The site will allow access to the user based on the login name used.

At this page, enter your Provider Representative **User Name** and **Password**. Then click the **Log In** button.

When logged in, you are taken to the *Budget Tool - Provider Admin* home page. From here you can create Data Entry accounts for agency staff (**Create Users**) or make changes to the accounts you've already created (**Manage Users**). You can also return to the Provider Representative **Home** page or completely **Logout** of the Budget Tool.

Note: If you are unable to log in and reach this page, please make sure that all of your pop-up blockers (including any Yahoo or Google search bars) are set to allow pop-ups on this site.

When you are completed with the site, please make sure to **Logout** before closing your internet browser.

2.1 Creating A User Account

Clicking once on the **Create Users** link brings up a blank form. Filling in these banks will establish a user account for the staff person who will be completing and submitting budgets and/or claims.

Note: If a Provider Representative will also be submitting Claims or Budgets, they must have a separate and distinct Data Entry username.

User Name: in this field, enter the login name for the staff person.

A staff member's user name should be easily recognized as belonging to a person, or otherwise tracked in connection to agency staff. In this way, a Provider Representative can confirm or identify a user. This is especially useful for future maintenance needs, such as deactivating a user, or tracking submission problems.

A clear connection between staff and their username is also helpful if a change in Provider Representative is made; the new person does not have to wonder who "SnowMaiden4" is and why they have access to the agency's budgets.

Password: Data Entry passwords must be at least six (6) characters in length and are case-sensitive. This means that the password must be spelled exactly the same way every time. If the user's password is True!Love2006, then the **T** and the **L** must both be capitalized or the user will not be able to log in to the system. If the user fails to correctly type their password six (6) times in a row, their account will become "locked". If a Data Entry user gets locked out, or if they have forgotten their password, they must contact the Provider Representative.

Confirm Password: In this field, you must retype the password you have just assigned to the Data Entry user. This confirms that there is no misspellings when setting up the account.

Email: This is the Email address associated with the staff account being created. Correspondence regarding the budgets and claims submitted by the staff person, including decision letters and requests for additional information, will be directed to this email account.

Process Claims: Check this box if the user will be creating or submitting claims for reimbursement of funds.

Process Budgets: Check this box if the user will be creating or submitting budgets to the BDDS for review and approval.

Note: A user can be set to process both Claims and Budgets, if desired.

When all the fields have been completed, press the **Create User** button.

A message will appear to tell you that the user was "successfully added."

There is now an option to **Create Another User**.
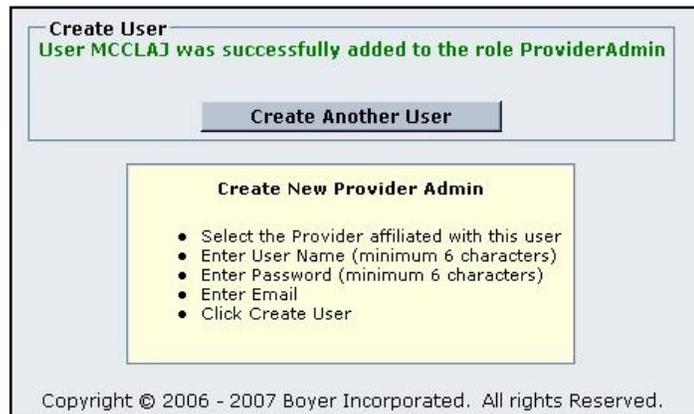
2.2 Managing and Editing A User Account

The Provider Representative is expected to maintain the user accounts for their agency. To make changes or corrections, or to unlock a user's account, click once on the **Manage Users** link on the left of the screen. The screen will change to a user management screen.

Choose the **Role** of the user whose account you wish to view.

If you select **BudgetUser** you will be able to view only the users that have the **Process Budgets** box checked. Selecting **ClaimUser** will limit the selection to only persons who have the **Process Claims** box checked. Selecting **All** will show all users, including those who are no longer active.

After choosing the **Role**, Click on the pull-down box to select a **User**. If the staff name you are looking for is not available in the pull-down, try changing the **Role**.
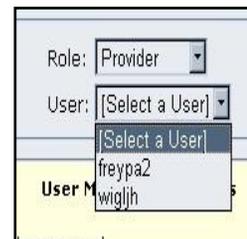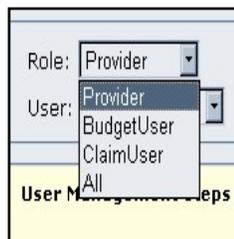
When the user is selected, the lower portion of the screen will show the account information for the selected user:

User Name: This is the username of the person. The username cannot be altered or deleted.

Provider Name: This is the name of the company. The company name cannot be altered or deleted.

User Active: When checked (text will say **True**), this box indicates that the user account is still active. If the user is no longer employed with the company, or if their responsibilities no longer include Budget or Claim submission, removing the check mark from this box (text will say **False**) will close the account and prevent the user from logging into the system.

Last Logon: This is the last date and time that this user logged into the Online Budget Tool.

Last Password Change: This is the last date and time that this user's Online Budget Tool password was changed.

User Locked Out: When the picture of the lock is open (text will say **False**), the user account is active. If the user mistypes their password six (6) times, the picture of the lock will show as closed (text will say **True**) and the user will not be able to log into the system.

If an account is locked, the **Unlock User** button at the bottom of the *User Info* area will become available. To unlock the user's account, simply click this button. The picture of the lock will change back to open (text will change to **False**) when the account is no longer locked out.

Budget: This box indicates whether or not the user is able to access the Budget area of the Online Budget tool to create and submit budgets to the BDDS for review and approval.

Claims: This box indicates whether or not the user is able to access the Claims area of the Online Budget Tool to create or submit claims for reimbursement of funds.

At the bottom of the *User Info* area of this screen is the **Reset Password** button. Clicking this button will open an area where the user's password can be changed. Once the password has been typed twice (**New Password** and

Confirm Password), press the **Save** button to make the change to the account.

If a user loses or forgets their password, a new password must be given to that account. This is to ensure security of the account and the information being stored and transmitted by that account.

3. Provider Info

The BDDS has placed various documents online for the convenience of the service provider. This information is available to all visitors of the Online Budget Tool and can be accessed by clicking on the **Provider Info** link on the **Home** page. You can get to the **Home** page at anytime by clicking the **Home** link on the left side of any page in the Online Budget Tool.

Clicking the **Provider Info** link will open a pop-up window with areas and folders for Announcements, Events, and Shared Documents. These folders contain documents from the BDDS.

Note: If you do not see any folders in an area, try clicking on the blue arrows to the far right of the category in which you are interested. If the blue arrow is pointing down and there are still no folders visible, it is possible that there are no documents posted in that category.